



Press Release

MAY STILL VERY CRITICAL FOR THE TRUCKS (-41.3%) AND THE BUSES (-69.2%) MARKETS, WHILE THE CONTRACTION IS CONTAINED FOR THE TOWED VEHICLES (-8.3%) TRACED BACK TO A COMPARISON WITH MAY 2019 IN STRONG DECLINE (-16.1%)

For towed vehicles, the progressive since the beginning of 2020 present warning results: the encouragement of investment in fleet renewal is essential. About buses field, will be released soon the Dossier on Passenger Transport drafted by ANFIA, in order to facilitate the view on the current evolution on people mobility

Turin, June 22nd 2020 - Despite the reopening of dealers and sales networks at the beginning of May and the progressive easing of the restrictive measures against Covid-19, the truck market still shows a significant double-digit decrease during the month, even if it is recovering from the collapse of April. For towed vehicles, the contraction is more contained, but traced back to a comparison with a May 2019 which decreased of 16.1%. For both sectors, the cumulative of the first 5 months of 2020 show warning results.

As already underlines, Covid-19 emergency showed the crucial role of the Transport sector in the distribution dynamics, but it has also strongly highlighted its fragilities, including a fragmentation and lack of uniformity between the various players that make it impossible - for the sector as a whole, from vehicle manufacturers to road transport and logistics companies - to react alone to a crisis of this magnitude. Last one consequences of the latter are above all a strong contraction in the registration of new vehicles and a necessary adjustment of post-Covid production levels, also due to the destocking requirements of vehicles already produced. In addition to this, the difficulties connected to the lack of liquidity and to the income loss for the companies of the sector. In order to avoid the ousting from the market of the companies most at risk, but also the stop of the production system, are essential the support investments, first of all to encourage investments for the renewal of fleets, but also to restart, together with sales, the rejuvenation of the fleet which is still not very virtuous from the environmental and safety point of view. These measures must be implemented quickly, starting with the resources already planned for in the Tax Law and the 2019 Budget Law.

Important resources have been already planned for the renewal of the fleet in the Tax Law and the 2019 Budget Law that only need to be defined in the implementation. ANFIA proposes to try to extend the incentives to all types of trailers and semi-trailers, not only those for intermodality, maybe linking them to a scrapping campaign, so as to have important impacts especially in terms of safety.

Analyzing numbers, in May 2020 have been released 1,354 certifications of new trucks (-41.3% respect to May 2019) and 944 certification of new heavy trailers and

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semitrailers, with GVW over 3,500 kg (-8.3%), divided in 88 trailers (-34.8%) and 856 semitrailers (-4.4%).

In the first five months of the year, 7,641 certifications of **new trucks**, are counted, the 29.4% less than the period from January to May 2019, and 4,426 certifications of new **heavy trailers and semitrailers** (-41.9% respect to January-May 2019), this way divided: 372 trailers (-43.5%) and 4.054 semitrailers (-41.7%).

Looking at **fuels**, gas powered trucks register from January to May 2020, a share of 5.7%, for an overall of 438 vehicles. Keep grow the LNG pumps network in Italy, with two new opening in May, in Spilamberto (MO) - the first point opened after the lockdown - in Perugia, which bring to 71 the number of liquid methane on the Italian territory¹. The recent opening, at the IVECO headquarter in Torino, of a new pump of natural gas both pressed (CNG), and liquefied (LNG) for the heavy industrial vehicles.

In detail:

Freights Transport Sector

Trucks with GVW > 3500 kg
according to weight classes

	May 2020	May 2019	var. %	Jan-May 2020	Jan-May 2019	var. %
Medium trucks >3500<16000 kg	297	493	-39,8	1.356	1.961	-30,9
Heavy trucks >=16000 kg	1.057	1.812	-41,7	6.285	8.855	-29,0
Total trucks with GVW>3500 kg	1.354	2.305	-41,3	7.641	10.816	-29,4

according to type

	May 2020	May 2019	var. %	Jan-May 2020	Jan-May 2019	var. %
Rigid trucks	761	1.221	-37,7	3.828	5.347	-28,4
Road tractors	593	1.084	-45,3	3.813	5.469	-30,3
Total trucks with GVW>3500 kg	1.354	2.305	-41,3	7.641	10.816	-29,4

Trailers & Semitrailers with GVW>3500 kg

according to type

	May 2020	May 2019	var. %	Jan-May 2020	Jan-May 2019	var. %
Trailers	88	135	-34,8	372	658	-43,5
Semitrailers	856	895	-4,4	4.054	6.959	-41,7
Total T&S with GVW>3500 kg	944	1.030	-8,3	4.426	7.617	-41,9

¹ Federmetano Data.

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Passengers Transport Sector

Buses with GVW >3500 kg

according to type	May 2020	May 2019	var. %	Jan-May 2020	Jan-May 2019	var. %
urban buses/midibuses	28	69	-59,4	326	459	-29,0
inter urban buses/midibuses	17	51	-66,7	258	273	-5,5
total LPT buses	45	120	-62,5	584	732	-20,2
tourist buses/midibuses	23	126	-81,7	397	439	-9,6
Total specific buses	68	246	-72,4	981	1.171	-16,2
minibuses	23	56	-58,9	299	230	30,0
schoolbuses	14	39	-64,1	124	224	-44,6
Total buses with GVW >3500 kg	105	341	-69,2	1.404	1.625	-13,6

Buses market with GVW over 3,500 kg in May registers 105 new units, with a decrease of 69.2%. All sector close the month with double-digit slowdown: -62,5% for LPT buses, -81.7% for tourist buses and midibuses, -58.9% for minibuses and -64.1% for schoolbuses.

In the first five months of 2020, have been released 1,404 buses certifications against the 1,625 from January to May 2019 (-13.6%). Positive sign only for minibuses (+30%), while is registered a slowdown for LPT buses (-20.2%), tourist buses and midibuses (-9.6%) and schoolbuses (-44.6%).

In order to collect updated information and data on the mobility and on passenger transport, encouraging an integrated reading of the phenomena taking place in this phase, where the ways in which people move are also evolving, the ANFIA Studies and Statistics Area realized an updated edition of Dossier on Passengers Transport which will be released soon.

In order to provide an extensive cognitive and informative contribution on the subject, the Dossier integrates, in the first part, information on the physical characteristics of the Italian territory and those of its demographic, economic and social development; the intensity of passengers traffic and of the fleet; the energy consumption of transport and the pollutant and climate-altering emissions of vehicles; weekday trips and transport habits; forms of collective and shared mobility; local public transport provision, to name but a few main arguments. Following the publishing the focuses will be on the analysis of the bus sector from the point of view of the market, the national industrial chain and the fleet; the measures planned for the sector in terms of vehicle safety and measures to support the renewal of the fleet in Italy.

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ANFIA - Italian Association of the Automotive Industry - is one of the leading Italian Trade Associations, members of CONFINDUSTRIA.

Born in March 1912, over these one hundred years, ANFIA mission has always been to represent the interests of its associate members and ensure effective communication between the Italian motor vehicle industries on the one hand, and the Public Administration and Italian political bodies on the other, with regard to all technical, economic, fiscal, legal, statistical and quality-related issues referred to the automotive sector. The Association is structured in three product-based Groups, each one chaired by a President. Components: motor vehicle parts and components manufacturers; Car Coachbuilders and Designers: companies working in the sector of design, engineering and style of motor vehicles and/or parts and components for the automotive sector; Motor vehicles: motor vehicles manufacturers in general, including trucks, trailers, camper vans, special means of transport.

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The Automotive Production Chain in Italy

5.529 companies

274.000 employees (direct and indirect), more than 7% of the employees in the Italian manufacturing sector

105.9 billion Euros of turnover, which means 11% of the Italian manufacturing sector turnover and of 6.2% of the Italian GDP

76.3 billion Euros of tax levy of motorization

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